

Atty Roberts, Gregory J., of Barrus & Roberts (for Petitioner Margaret A. Ramirez, Administrator)

(1) First and Final Account of Administrator with Will Annexed and (2) Petition for its Settlement, for Allowance of Fees and for (3) Final Distribution

DOD: 8/27/1979		MARGARET A. RAMIREZ , daughter and Administrator with Will Annexed appointed on 6/13/2013 following the death of Executor PETRA MEDINA (DOD 10/13/2009), is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Account period: 8/27/1979 – 4/8/2014	1. Paragraph 21(b) of the <i>Petition</i> states reimbursement of attorney's costs advanced and to be advanced of \$1,886.50 shall be deducted from the remaining assets of the estate prior to distribution. However, <i>Petition</i> does not specifically make a request for reimbursement of costs advanced, nor is an itemization of costs included with the <i>Petition</i> as required by Local Rule 7.17(C) for the Court in its discretion to consider and approve reimbursement to attorney of allowable costs advanced. Proposed distribution amounts stated in proposed order presuppose that costs advanced are reimbursable and approved.
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Accounting - \$77,342.51	<p>Note: If Court determines an informal accounting of the closing reserve is warranted, Court will set a Status Hearing as follows:</p> <ul style="list-style-type: none"> Monday, January 26, 2015 at 9:00 a.m. in Dept. 303 for an Informal Accounting of \$10,000.00 Closing Reserve. <p>Pursuant Local Rule 7.5, if the document noted above is filed 10 days prior to the date listed, the hearing will be taken off calendar and no appearance will be required. Filing of the informal accounting of closing reserve will not generate a new hearing date.</p>
<input checked="" type="checkbox"/>	Inventory	Beginning POH - \$13,000.00	
<input checked="" type="checkbox"/>	PTC	Ending POH - \$67,038.14 (all cash)	
<input checked="" type="checkbox"/>	Not.Cred.	Administrator - \$3,093.70 (statutory)	
<input checked="" type="checkbox"/>	Notice of Hrg	Attorney - \$3,093.70 (statutory)	
<input checked="" type="checkbox"/>	Aff.Mail	Attorney XO - \$1,162.00 (per Declaration and itemization, for services from 7/25/2008 to 3/5/2014 [gap from 2008 to 2011], including sale of real property;)	
<input type="checkbox"/>	Aff.Pub.	Costs - \$1,886.50 (not itemized)	
<input type="checkbox"/>	Sp.Ntc.	Closing - \$10,000.00 (for closing expenses of administration, estate federal and state income taxes consisting primarily of capital gains tax on the real property sale, and accounting fees;)	
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters 071007; 061313		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
		~Please see additional page~	
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice N/A		
		Reviewed by: LEG	
		Reviewed on: 6/26/14	
		Updates:	
		Recommendation:	
		File 1 - Ramirez	

Distribution pursuant to Decedent's Will is to:

- **MANUELA FARIAS – \$254.10 cash plus \$9,306.35 cash** (from separate estate accounts);
- **MARIANO RAMIREZ, JR. – \$254.10 cash plus \$9,306.35 cash** (from separate estate accounts);
- **MARGARET A. RAMIREZ – \$254.10 cash plus \$9,306.35 cash** (from separate estate accounts);
- **MARY JESUS LYLES – \$254.10 cash plus \$9,306.35 cash** (from separate estate accounts);
- **DOLORES HERMOSILLO ROYBAL – \$254.10 cash plus \$9,306.35 cash**(from separate estate accounts).

Amended Waiver of Account and Petition for Allowance of Statutory Fees, and for Final Distribution

DOD: 04/08/13			CYNTHIA GERRINGER , Administrator, is Petitioner.			NEEDS/PROBLEMS/COMMENTS:		
			Accounting is waived.					
Cont. from			I & A - \$244,618.76			<u>Note:</u> The Mutual Release and Settlement Agreement between the parties is attached to the petition as Attachment 1.		
<input type="checkbox"/>	Aff.Sub.Wit.		POH - \$110,367.10					
<input checked="" type="checkbox"/>	Verified		Administrator - \$8,439.50 (statutory)					
<input checked="" type="checkbox"/>	Inventory		Attorney - \$8,439.50 (statutory)					
<input checked="" type="checkbox"/>	PTC		Closing - \$1,000.00					
<input checked="" type="checkbox"/>	Not.Cred.		Distribution, pursuant to intestate succession and subject to settlement agreement, is to:					
<input checked="" type="checkbox"/>	Notice of Hrg		Eleanor Copeland - \$46,244.06					
<input checked="" type="checkbox"/>	Aff.Mail	w/	Cynthia Gerringer - \$23,122.02, plus ½ interest in household furniture & furnishings valued at \$500.00					
	Aff.Pub.		John Marin - \$23,122.02, plus ½ interest in household furniture & furnishings valued at \$500.00					
	Sp.Ntc.							
	Pers.Serv.							
	Conf. Screen							
	Letters	06/27/13				Reviewed by: JF Reviewed on: 06/26/14 Updates: Recommendation: File 2A - Copeland		
	Duties/Supp							
	Objections							
	Video Receipt							
	CI Report							
<input checked="" type="checkbox"/>	9202							
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	Status Rpt							
	UCCJEA							
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<input checked="" type="checkbox"/>	FTB Notice							

Petition to Determine Heirship

<p>DOD: 04/08/13</p> <p>Cont. from 011614, 021314, 032614, 052314, 061014</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;"></td><td style="width: 80%;">Aff.Sub.Wit.</td><td style="width: 10%;"></td></tr> <tr><td style="text-align: center;"><input checked="" type="checkbox"/></td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td style="text-align: center;"><input checked="" type="checkbox"/></td><td>Notice of Hrg</td><td></td></tr> <tr><td style="text-align: center;"><input checked="" type="checkbox"/></td><td>Aff.Mail</td><td style="text-align: center;">w/</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td></td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td></td><td>Order</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>		Aff.Sub.Wit.		<input checked="" type="checkbox"/>	Verified			Inventory			PTC			Not.Cred.		<input checked="" type="checkbox"/>	Notice of Hrg		<input checked="" type="checkbox"/>	Aff.Mail	w/		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report			9202			Order	x		Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice		<p>ELEANOR COPELAND, is Petitioner.</p> <p>Petitioner states:</p> <ol style="list-style-type: none"> 1. She is the mother of George Copeland, predeceased spouse of decedent Rebecca Copeland and is entitled to inherit under the laws of intestacy set forth in Probate Code § 6402.5(a)(2) and 6402.5(b)(2) and 240. 2. Decedent died intestate on 04/08/13 leaving an estate in Fresno County, California. 3. Decedent's siblings are entitled to inherit under Probate Code § 6402(c). 4. Cynthia Gerringer, decedent's sister, filed a Petition for Probate on 05/21/13 and is now the Administrator of decedent's estate. 5. Petitioner's son, George Copeland, was married to the decedent until his death on 05/21/09. Since George died less than 5 years before the decedent's death, Petitioner is entitled to one-half of the decedent's community property (Probate Code § 6402.5(a)(2)). 6. Petitioner alleges that the estate should be divided as follows: <u>Community Property:</u> <ul style="list-style-type: none"> - ½ to Eleanor Copeland, mother of predeceased spouse of the decedent - ¼ to John Robert Marin, brother of decedent - ¼ to Cynthia Gerringer, sister of decedent <u>Separate Property:</u> <ul style="list-style-type: none"> - ½ to John Robert Marin, brother of decedent - ½ to Cynthia Gerringer, sister of decedent <p>Birth/Death and Marriage Certificates attached to Petition.</p> <p>Petitioner prays that the Court determine the heirship and entitlement to the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 06/10/14</u></p> <p>1. Need Order.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td>Reviewed by: JF</td></tr> <tr><td>Reviewed on: 06/26/14</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 2B – Copeland</td></tr> </table>	Reviewed by: JF	Reviewed on: 06/26/14	Updates:	Recommendation:	File 2B – Copeland
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DOD: 04/08/13	<p>CYNTHIA GERRINGER, Administrator, filed a Report on Waiver of Account and Petition for its Settlement, etc. on 11/20/13.</p> <p>ELEANOR COPELAND, mother of decedent's predeceased spouse, filed Objections to Report and Waiver of Account and Objections to Petition for its Settlement and a Petition to Determine Heirship on 01/13/14.</p> <p>On 03/26/14, the parties engaged in a Settlement Conference. Minute Order from Settlement Conference set this matter for Status Re: Settlement Agreement and states: The Court notes that Ms. Nichols has been authorized to enter into an agreement on behalf of Eleanor Copeland. Parties engage in settlement discussions with the Court. Parties reach a resolution. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement. Counsel to prepare the agreement.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 06/10/14</u></p> <p>1. Need updated status report regarding settlement agreement.</p>
Cont. from 052314, 061014		
Aff.Sub.Wit.		
Verified		
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Notice of Hrg		
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Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 06/26/14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 2C - Copeland</p>

Atty Petty, Jonathon L., sole practitioner (for Petitioner Alex Brehm, Administrator)
 Atty Wright, Judy, of Wright & Wright (for Petitioner Alex Brehm, Administrator)

**Amended First and Final Report of Administrator; Petition for Final
 Distribution Without an Accounting and for Allowance of Compensation for
 Ordinary Services**

DOD: 6/8/2013		ALEX BREHM , family friend and Administrator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Statutory fee calculation may use an incorrect sum for losses, based upon Paragraph 7 of the <i>Petition</i> , which states the total of sales of tangible personal property both as \$25,584.56 and as \$24,584.56 . Losses on those sales may therefore be either \$5,415.44 or \$4,415.44 , in which case the latter sum for losses would result in the statutory fee base as \$200,584.56 rather than \$199,584.60 as stated in Paragraph 19 of the <i>Petition</i> , with the statutory fee calculating as \$7,011.69 .
		Accounting is waived.	
Cont. from		I & A — \$160,850.00	
<input type="checkbox"/>	Aff.Sub.Wit.	POH — \$165,287.65 (\$130,287.65 is cash)	
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory	Administrator — [\$6,987.54 ?] (statutory)	
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.	Attorney Petty — [\$2,987.54 ?] (statutory, to be allocated between Petitioner's former and current law firms;)	
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	Attorney Wright — \$4,000.00 (statutory, to be allocated between Petitioner's former and current law firms;)	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.	Closing — \$2,000.00 (any liabilities)	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters	Distribution pursuant to intestate succession is to:	
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt	GEOFFREY WORSTELL – \$39,656.29 cash , and 100% interest in real property (consent to distribution attached as Exhibit B);	
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202	NANCY CALDWELL-HERSHORIN – \$74,656.28 cash (consent to distribution attached as Exhibit B).	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
			Reviewed on: 6/26/14
			Updates:
			Recommendation:
			File 3 - Worstell

4 Fred Otto Loeffler (CONS/PE)**Case No. 13CEPR00655****Atty Downing, Marcella (for Diane Huerta – daughter)****Atty Bagdasarian, Gary (for Linda Plitt – daughter)****Atty Rube, Melvin K. (for Fred & Kathleen Loeffler – proposed conservatees)****Atty Janisse, Ryan (for Mick Loeffler – son)****Atty Johnson, Summer A. (for Bruce Bickel – temporary conservator of the estate)****Probate Status Hearing Re: Status of Conservatorship, Settlement of Case & Accounting of Temporary Conservatorship**

	On 07/26/13, DIANE HUERTA and LINDA PLITT , daughters, filed a Petition for Appointment of Probate Conservator of the Person and Estate.	NEEDS/PROBLEMS/COMMENTS:
	On 07/29/13, the Court granted the Petition for Appointment of Temporary Conservator of the Person and Estate pending the hearing on the temporary conservatorship.	
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory	Proposed Conservatee and Mick Loeffler, son, filed objections to the conservatorships.	
PTC		
Not.Cred.		
Notice of Hrg	On 08/19/13, after an evidentiary hearing, the court found that there was no emergency requiring a temporary conservatorship.	
Aff.Mail		
Aff.Pub.		
Sp.Ntc.	On 09/18/13, Judge Black set the matter for trial and after reviewing additional documents, took the matter of a temporary conservatorship under submission and on 09/25/13, signed an Order appointing Bruce Bickel as temporary conservator of the Estate.	
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	In addition to the conservatorship petition, Diane and Linda also filed a Petition to Determine Validity of the Trust, etc. on 08/19/13. After a hearing in that matter, Bruce Bickel was appointed as temporary trustee of the Trust.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting	The parties participated in settlement conferences on 11/07/13, 01/07/14, 02/20/14 and 04/02/14 and participated in mediation with Judge Howard Broadman (ret.) on 05/17/14.	Reviewed by: JF
Status Rpt		Reviewed on: 06/26/14
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice	At mediation on 05/17/14, the parties reached and executed a settlement agreement. On 06/19/14, a Petition for Approval of Settlement Agreement was filed by Bruce Bickel and is set for hearing on 07/15/14 at 3:30 in Dept. 502.	File 4 – F. Loeffler

Probate Status Hearing Re: Status of Conservatorship, Settlement of Case & Accounting of Temporary Conservatorship

Cont. from		
	Aff.Sub.Wit.	
	Verified	
	Inventory	
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	Not.Cred.	
	Notice of Hrg	
	Aff.Mail	
	Aff.Pub.	
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	CI Report	
	9202	
	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
	Citation	
	FTB Notice	
On 07/26/13, DIANE HUERTA and LINDA PLITT , daughters, filed a Petition for Appointment of Probate Conservator of the Person and Estate. On 07/29/13, the Court granted the Petition for Appointment of Temporary Conservator of the Person and Estate pending the hearing on the temporary conservatorship.		NEEDS/PROBLEMS/COMMENTS:
Proposed Conservatee and Mick Loeffler, son, filed objections to the conservatorships.		
On 08/19/13, after an evidentiary hearing, the court found that there was no emergency requiring a temporary conservatorship.		
On 09/18/13, Judge Black set the matter for trial and after reviewing additional documents, took the matter of a temporary conservatorship under submission and on 09/25/13, signed an Order appointing Bruce Bickel as temporary conservator of the Estate.		
In addition to the conservatorship petition, Diane and Linda also filed a Petition to Determine Validity of the Trust, etc. on 08/19/13. After a hearing in that matter, Bruce Bickel was appointed as temporary trustee of the Trust.		
The parties participated in settlement conferences on 11/07/13, 01/07/14, 02/20/14 and 04/02/14 and participated in mediation with Judge Howard Broadman (ret.) on 05/17/14.		
At mediation on 05/17/14, the parties reached and executed a settlement agreement.		
On 06/19/14, a Petition for Approval of Settlement Agreement was filed by Bruce Bickel and is set for hearing on 07/15/14 at 3:30 in Dept. 502.		
		Reviewed by: JF
		Reviewed on: 06/26/14
		Updates:
		Recommendation:
		File 5 – K. Loeffler

DOD: 4-30-13	MARGUERITE HUGHES was appointed as Administrator with Will Annexed on 11-18-13 with bond of \$550,000.00.	NEEDS/PROBLEMS/COMMENTS:
Cont. 041814, 060614	Bond was filed on 1-14-14 and Letters issued on 1-23-14.	<u>Continued from 4-18-14, 6-6-14</u>
Aff.Sub.Wit.	At the hearing on 11-18-13, the Court set this status hearing for the filing of the Inventory and Appraisal.	<u>Minute Order 4-18-14:</u>
Verified		No appearances. Matter continued to 6-6-14. The Court orders Dennis Watson to be personally present on 6-6-14 if the inventory and appraisal has not been filed.
Inventory		A copy of the minute order was mailed to Mr. Watson on 4-18-14.
PTC		<u>Minute Order 6-6-14:</u> No
Not.Cred.		appearances. The Court sets the matter for an Order to Show Cause on 7-1-14 regarding failure to appear and imposition of sanctions in the amount of \$500.00. Dennis Watson is ordered to be personally present.
Notice of Hrg		The Order to Show Cause and Minute Order were mailed to Attorney Watson on 6-16-14.
Aff.Mail		<u>Note:</u> The Inventory and Appraisal was filed on 6-23-14.
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-25-14
		Updates:
		Recommendation:
		File 6A – Peters

DOD: 4-30-13			MARGUERITE HUGHES was appointed as Administrator with Will Annexed on 11-18-13 with bond of \$550,000.00.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.		Bond was filed on 1-14-14 and Letters issued on 1-23-14.	Note: The I&A was filed on 6-23-14.	
	Verified				
	Inventory		At the hearing on 11-18-13, the Court set status hearing for the filing of the Inventory and Appraisal.		
	PTC				
	Not.Cred.		There were no appearances at the status hearings on 4-18-14 and 6-6-14.		
	Notice of Hrg		On 6-6-14, the Court set this Order to Show Cause re sanctions in the amount of \$500.00 and ordered Attorney Watson to be personally present.		
	Aff.Mail				
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
	Conf. Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
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	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
					Reviewed by: skc
					Reviewed on: 6-25-14
					Updates:
					Recommendation:
				File 6B – Peters	

Amended Petition for Settlement of First and Final Account, Petition for Final Distribution and for Allowance of Compensation for Ordinary Services

DOD: 9-19-13		PAUL REILLY, JR., Executor with Full IAEA without bond, is Petitioner. Account period: 9-19-13 through 5-20-14 Accounting: \$301,936.84 Beginning POH: \$291,429.09 Ending POH: \$204,960.30 (cash) Executor (Statutory): \$7,478.74 Attorney (Statutory): \$7,478.74 Closing: \$800.00 Distribution pursuant to Decedent's will: Cindy M. Reilly: \$23,650.35 Paul Reilly, Jr.: \$23,650.35 Donna Reilly Mosqueda: \$23,650.35 James Reilly: \$23,650.35 Mark Sawyer: \$23,650.35 Rodney Harmecek: \$23,650.35 Marta Angulo Doran: \$23,650.35 Richard Angulo: \$23,650.35	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
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<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 6-26-14 Updates: Recommendation: SUBMITTED File 7 - Reilly	

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Page 2

Respondent states that upon the death of Donald J. Schmidt, he became Co-Trustee with Norma E. Schmidt until her death on 8-8-09, and since that date he has been sole successor trustee. Respondent alleges that he has kept the beneficiaries informed of his trust administration and denies that he has failed to provide information or accountings to them.

Furthermore, with regard to Petitioner's request for information and an accounting dated 9-6-13, Respondent alleges that this request was made 18 months after Respondent completed trust administration on 3-5-12 and had disbursed all of the monies to Petitioner, Respondent, and beneficiary Sherrie Kay Worthen. Nevertheless, Respondent's counsel contacted Petitioner's counsel by telephone regarding the request and informed Petitioner's counsel that a formal accounting would cost in excess of \$3,000.00 in accounting fees, which would have to be shared equally by the beneficiaries, since final distribution was already accomplished. Petitioner's counsel informed Respondent's counsel that he would check with Petitioner and respond. Respondent did not receive any further response until this petition was filed.

Respondent denies that he has failed to provide information to Petitioner and alleges that he has provided written status reports throughout his administration, the trust's tax returns, and with accounting information.

Respondent further alleges that Petitioner's document requests as set forth in the petition are overbroad and burdensome. In this regard, the requests are not related to the period of trust administration following the death of Norma E. Schmidt, but instead are either wholly unlimited as to time, or reach back to the date of Donald J. Schmidt's death, during which time Petitioner was not entitled to any account or trust information because Mrs. Schmidt was both a trustee and beneficiary. Probate Code §16069(b).

Respondent alleges he has provided reasonable information regarding his trust administration and periodic accounts. See memo dated 9-18-09 regarding assets and plan of distribution, schedule dated 12-17-09, letter dated 4-15-11, status report dated 9-27-11, letter dated 2-13-12, status report dated 3-5-12, balance sheets, etc. (attached).

See response for details regarding each item requested by the Petitioner.

Respondent requests the Court deny the relief requested in the petition.

DOD: 5-10-14		<p>GREGORY SASSANO, Brother, is Petitioner and requests appointment as Administrator with Full IAEA without bond.</p> <p>Petitioner is the sole heir and waives bond.</p> <p>Full IAEA: ok</p> <p>Decedent died intestate</p> <p>Residence: Clovis, CA Publication: Fresno Business Journal</p> <p>Estimated value of estate: Personal property: \$ 70,000.00 Real property: \$3,500,000.00 Total: \$3,570,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Tues 11-11-14 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Tues 11-10-15, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
✓	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 6-26-14</p> <p>Updates:</p> <p>Recommendation: SUBMITTED</p> <p>File 9 - Sassano</p>	

10 Florence E. Dolby (CONS/PE)

Atty Bagdasarian, Gary G.

Atty Lind, Ruth P

Case No. 14CEPR00457

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
1820, 1821, 2680-2682)

Age:		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 7-15-14</u> per Attorney request
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 6-26-14
		Updates:
		Recommendation:
		File 10 - Dolby

11 Christopher Robles-Ordonez (GUARD/P)

Case No. 11CEPR01100

Atty DeLaCruz, Pablo (Pro Per – Non-relative – Petitioner)

Atty Avila, Alicia Galvan (Pro Per – Non-relative – Petitioner)

Atty Heredia, Rachel (Pro Per – Maternal Great-Grandmother – Current Guardian)

Petition for Appointment of Successor Guardian of the Person (Prob. C. 1510)

			PABLO DELACRUZ and ALICIA GALVAN AVILA , non-relatives, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
			RACHEL HEREDIA , Maternal Great-Grandmother, was appointed Guardian on 4-5-12. - Consents and waives notice	Note: Notice to the unknown father was previously dispensed on 4-5-12 in connection with the original guardianship petition. If notice is not dispensed for the father and paternal grandparents, the Court may require diligence or notice.
	Aff.Sub.Wit.		Father: UNKNOWN	Note: Diligence regarding the maternal grandfather was previously filed by Ms. Heredia in connection with the original petition. IF notice is not dispensed for the maternal grandfather, the Court may require diligence or notice.
✓	Verified		- Petitioners request to dispense notice	
	Inventory		Mother: CORINA MARIA ORDONEZ	
	PTC		- Consents and waives notice	
	Not.Cred.		Paternal Grandparents: Unknown	
✓	Notice of Hrg		- Petitioners request to dispense notice	
✓	Aff.Mail	W	Maternal Grandfather: Felix Ordonez	
	Aff.Pub.		- Petitioners request to dispense notice	
	Sp.Ntc.		Maternal Grandmother: Priscilla Ordonez	
N/A	Pers.Serv.		- Mailed notice on 5-6-14	
✓	Conf. Screen		Petitioners state the current guardian is suffering from health problems and can no longer care for the minor. She is also caring for her husband, who suffered an aneurysm and is bed bound. The minor is two years old and very active. Petitioner Pablo Delacruz was originally thought to be the father, but blood tests revealed that he is not the father. However, Petitioners have already bonded with the minor and the guardian and are his godparents. The current guardian asked Petitioners to take over the guardianship. The mother is currently incarcerated and consents. The minor has spent weekends with Petitioners frequently and is bonded with them.	
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	DSS Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice		DSS Social Worker Irma Ramirez filed a report on 6-20-14.	
				Reviewed by: skc
				Reviewed on: 6-26-14
				Updates:
				Recommendation:
				File 11 – Robles-Ordonez

			NO TEMP REQUESTED	NEEDS/PROBLEMS/COMMENTS:
			VERONICA BRITO and ROBERT JESSE MARTINEZ , Non-relatives, are Petitioners.	
			Father: GUILLERMO HERNANDEZ - Deceased	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg	X	Paternal Grandfather: Guillermo Hernandez - Declaration of Due Diligence filed 5-27-14	
	Aff.Mail	X	Paternal Grandmother: Rosa Martinez - Declaration of Due Diligence filed 5-27-14	
	Aff.Pub.		Maternal Grandfather: Unknown - Declaration of Due Diligence filed 5-27-14	
	Sp.Ntc.		Maternal Grandmother: Silvia River - Declaration of Due Diligence filed 5-27-14	
N/A	Pers.Serv.			
✓	Conf. Screen		Petitioners state the mother does not have a stable home at the moment. Attached is a Caregiver's Authorization Affidavit dated 4-30-14 and a letter from the mother dated 4-2-14 giving petitioners guardianship of the two minors.	
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	DSS Report		DSS Social Worker Irma Ramirez filed a report on 6-17-14.	
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA	X		
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 6-26-14
				Updates:
				Recommendation:
				File 12 – Martinez & Hernandez

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 4-12-13	<p>JEOFFERY SPEER was appointed Administrator with Full IAEA without bond on 11-18-13.</p> <p>Letters issued on 11-20-13.</p> <p>At the hearing on 11-20-13, the Court set this status hearing for the filing of the Inventory and Appraisal.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Continued from 4-18-14, 6-6-14</u></p> <p>Minute Order 4-18-14: No appearances. Matter continued to 6-6-14. The Court orders Jeoffery Speer to be personally present on 6-6-14 if the inventory and appraisal has not been filed.</p> <p>A copy of the minute order was mailed to Mr. Speer on 4-18-14.</p> <p>Minute Order 6-6-14: No appearances. Matter continued to 7-1-14. The Court orders Jeoffery Speer to be personally present on 6-6-14 if the inventory and appraisal has not been filed.</p> <p>A copy of the minute order was mailed to Mr. Speer on 6-13-14.</p> <p><u>As of 6-25-14, nothing further has been filed.</u></p> <p>Note: The petition for probate estimated the estate value at \$341,893.00, including real and personal property.</p> <p>1. Need I&A per Probate Code §8800 or verified written status report pursuant to local rules.</p>	
Cont from 041814, 060614			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
<p>Reviewed by: skc</p> <p>Reviewed on: 6-25-14</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 – Speer</p>			

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 2/26/12	ANH PHU TU , surviving spouse, is petitioner and requests appointment as Administrator with without bond.		NEEDS/PROBLEMS/COMMENTS:
			1. Need Affidavit of Publication. 2. Need Order.
Cont. from	All heirs waive bond.		<p>Note: If the petition is granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> Friday, August 19, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/> Aff.Sub.Wit.	Full IAEA - need publication.		
<input checked="" type="checkbox"/> Verified	Decedent died intestate.		
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC	Residence: Fresno		
<input type="checkbox"/> Not.Cred.	Publication: NEED		
<input type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail	W/	Estimated value of the Estate:	
<input type="checkbox"/> Aff.Pub.	X	Real property - \$8,099.00	
<input type="checkbox"/> Sp.Ntc.		(\$331,293.00 less encumbrances of \$323,194.00.)	
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters		Probate Referee: RICK SMITH	
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input type="checkbox"/> Order	X		
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: KT
			Reviewed on: 6/26/14
			Updates:
			Recommendation:
			File 14 - Dunn

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/23/2013	EDWARD MOLLOY , was appointed Administrator with full IAEA authority without bond on 02/11/2014.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order of 06/06/2014: No appearances. Edward Molloy is ordered to be personally present on 07/01/2014 if the Inventory and Appraisal has not been filed.
Cont. from 060614	Letters issued on 02/11/2014.	Copy of Minute Order mailed to Edward Molloy on 06/13/2014.
Aff.Sub.Wit.	Minute Order of 02/11/2014 set this status hearing for the filing of the Inventory and Appraisal.	
Verified		<p>1. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/26/2014
		Updates:
		Recommendation:
		File 15 - Molloy

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/17/2013	RONALD CALHOUN , was appointed Executor with full IAEA authority without bond on 01/27/2014.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order of 06/06/2014: No appearances. Ronald Calhoun is ordered to be personally present on 07/01/2014 if the Inventory and Appraisal has not been filed.
Cont. from 060614	Letters issued on 01/28/2014.	Copy of Minute Order mailed to Ronald Calhoun on 06/13/2014.
Aff.Sub.Wit.	Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.	
Verified		<p>2. Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 06/26/2014
		Updates:
		Recommendation:
		File 16 - Ello

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 27 years		TEMPORARY EXPIRES 7/1/14		NEEDS/PROBLEMS/COMMENTS:	
		SHEILA R. SCOTT , mother, is petitioner and requests appointment as conservator of the person with medical consent powers and conservator of the estate without bond.		Court Investigator Advised Rights on 6/20/14.	
Cont. from				1. Need Notice of Hearing.	
<input type="checkbox"/>	Aff.Sub.Wit.			2. Need proof of service of the Notice of Hearing along with a copy of the Petition on:	
<input checked="" type="checkbox"/>	Verified	Estimated value of the estate: \$0		a. JL Scott (maternal grandparent)	
<input type="checkbox"/>	Inventory	Declaration of Stephen Grossman, M.D., 5/22/14 supports the request for medical consent powers.		b. Odesser Scott (maternal grandparent)	
<input type="checkbox"/>	PTC			c. Antoine Foster (brother)	
<input type="checkbox"/>	Not.Cred.			3. Need citation.	
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	Petitioner states the proposed conservatee cannot breathe or eat on her own. She cannot talk or move her limbs. She cannot care for herself in any way. She cannot make financial decisions on her own behalf.		4. Need proof of personal service of the Citation on the proposed conservatee.
<input type="checkbox"/>	Aff.Mail	<input checked="" type="checkbox"/>			
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input checked="" type="checkbox"/>	Court Investigator Jennifer Young's Report filed on 6/25/14.		Note: If the conservatorship of the estate is granted, status hearings will be set as follows:
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	Probate Referee: Rick Smith (if conservatorship of the estate is granted)		<ul style="list-style-type: none"> Friday, April 26, 2013 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. Friday, January 24, 2014 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution.
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>			Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			Reviewed by: KT
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>			Reviewed on: 6/27/14
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>			Updates:
<input type="checkbox"/>	Citation	<input checked="" type="checkbox"/>			Recommendation:
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			File 17 - Foster

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 4-27-14		<p>BRUCE VARNEY, Son and named executor without bond, is Petitioner.</p> <p>Petitioner is a resident of Fairview, North Carolina.</p> <p>IAEA is not requested.</p> <p>Will dated 4-25-12</p> <p>Residence: Fresno Publication: Need publication</p> <p>Estimated value of estate: Real property: \$150,000.00</p> <p>Probate Referee: Steven Diebert</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need publication pursuant to Probate Code §8120. 2. Petition is incomplete at #7 or #8 (issue of predeceased child). 3. Petitioner is a resident of Fairview, North Carolina. The Court may require bond if the proposed personal representative resides outside California or for other good cause, even if the will waives bond, pursuant to Cal. Rules of Court 7.201(b) and Probate Code §8571. <p>Note: If granted, status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Tues 8-19-14 9:00 a.m. in Department 303, for the filing of the bond, if required. • Tues 11-11-14 at 9:00 a.m. in Department 303, for the filing of the inventory and appraisal. • Tues 11-10-15, 2015 at 9:00 a.m. in Department 303, for the filing of the first account or petition for final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior the date set the status hearing will come off calendar and no appearance will be required.</p>
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub. X		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc
Reviewed on: 6-26-14
Updates:
Recommendation:
File 18 - Varney

Atty Teixeira, J. Stanley, sole practitioner (for Petitioners Keith D'Ambrosio, second cousin, and Donna K. Farris, proposed Conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate

Age: 59 years		<u>GENERAL HEARING SET FOR 7/30/2014</u>		NEEDS/PROBLEMS/COMMENTS: Court Investigator Advised Rights on 6/20/2014. Note Re Bond: Petitioners state that once a reasonably estimated value of her interest is determined, Petitioners will file a declaration as to the value of the estate and the amount of the bond to be furnished. Status Hearing will be set at the time of the general hearing for filing proof of bond.
		KEITH D'AMBROSIO, second cousin, and DONNA K. FARRIS, proposed Conservatee, are Petitioners and request KEITH D'AMBROSIO be appointed as Conservator of the Person and Estate with bond to be filed following determination of the potential interest of the proposed Conservatee in the ESTATE OF TOM STEEL being administered in Oklahoma.		
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	N/A		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting Status Rpt			
	UCCJEA			
	Citation	N/A		
	FTB Notice			
		Estimated Value of the Estate: Personal property - <i>undetermined</i> Petitioners state the proposed Conservatee is developmentally disabled and has recently moved from Oklahoma to California to be with family here, as TOM STEEL , who was acting as her unofficial guardian and with whom she had been residing in Oklahoma, died earlier this year and the proposed Conservatee was left alone without any other family in Oklahoma. Petitioners state TOM STEEL was acting as guardian of proposed Conservatee without appointment by the Court in Oklahoma, and the proposed Conservatee may be entitled to assets in TOM STEEL'S estate, and may have claims that property in his estate was misappropriated. Petitioners state that Petitioner's attorney is in communication with the attorney handling matters related to TOM STEEL'S estate; however, the nature and extent of the proposed Conservatee's interest in the estate is undetermined at this time, and the Oklahoma attorney cannot pursue any interest the proposed Conservatee may have in TOM STEEL'S estate without appointment of a Conservator for her.		
		Court Investigator Julie Negrete's Report was filed on 6/25/2014.		
		Reviewed by: LEG		
		Reviewed on: 6/26/14		
		Updates:		
		Recommendation:		
		File 19 - Farris		

ProPer Brown, Andrew L. (pro per – mother's fiancé/Petitioner)

ProPer Jimenez, Connie (pro per – maternal aunt/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 11	TEMPORARY EXPIRES 07/01/2014		NEEDS/PROBLEMS/COMMENTS:
	ANDREW BROWN , mother's fiancé, and CONNIE JIMENEZ , maternal aunt are petitioners.		CONTINUED FROM 04/22/14 Minute Order from 04/22/14 states: Petitioners need to fill out ICWA and file it. The Court finds that Mr. Robinson has been given actual notice. Temporary Letters extended to 07/01/14.
	Father: DARNELL ROBINSON Mother: CYNTHIA VALDEZ - Consent and Waiver of Notice filed 12/13/2013		
Cont. from 020414, 042214	Paternal Grandfather: Paternal Grandmother:		Note: The required ICWA notices were mailed on 04/25/14. (60 day waiting period elapsed on 06/24/14). As of 06/26/14, a response has been received by the Bureau of Indian Affairs indicating that they defer to the tribe indicated in the notice. No response has been received from the tribe.
<input type="checkbox"/> Aff.Sub.Wit. <input checked="" type="checkbox"/> Verified <input type="checkbox"/> Inventory <input type="checkbox"/> PTC <input type="checkbox"/> Not.Cred. <input checked="" type="checkbox"/> Notice of Hrg <input checked="" type="checkbox"/> Aff.Mail w/ <input type="checkbox"/> Aff.Pub. <input type="checkbox"/> Sp.Ntc. <input type="checkbox"/> Pers.Serv. x <input checked="" type="checkbox"/> Conf. Screen <input checked="" type="checkbox"/> Letters <input checked="" type="checkbox"/> Duties/Supp <input type="checkbox"/> Objections <input type="checkbox"/> Video Receipt <input checked="" type="checkbox"/> CI Report <input type="checkbox"/> 9202 <input checked="" type="checkbox"/> Order <input type="checkbox"/> Aff. Posting <input type="checkbox"/> Status Rpt <input checked="" type="checkbox"/> UCCJEA <input type="checkbox"/> Citation <input type="checkbox"/> FTB Notice	Maternal Grandfather: ROBERT VALDEZ – served by mail on 12/06/13 Maternal Grandmother: JANET MARIE JIMENEZ – served by mail on 12/06/13		
	Petitioners state: Da'Veon's mother, Cynthia Valdez, has been diagnosed with Stage 4 cancer and her death is imminent, she may not live to the hearing. The biological father has not been in the child's life for the entirety of it and has not seen the child since the age of three. The biological father is believed to be incarcerated in California. The mother is anxious for the child to have guardians prior to her death, which could come at any moment. Proposed guardian, Andrew Brown, has helped raise the minor and has been his father figure for most his life.		1. Need service at least 15 days before the hearing of Notice of Hearing with a copy of the Petition for Guardianship or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Darnell Robinson (father) – personal service required b. Paternal grandfather – service by mail sufficient c. Paternal grandmother – service by mail sufficient
	Court Investigator Charlotte Bien filed a report on 01/24/14.		Reviewed by: JF Reviewed on: 06/26/14 Updates: Recommendation: File 20 – Robinson